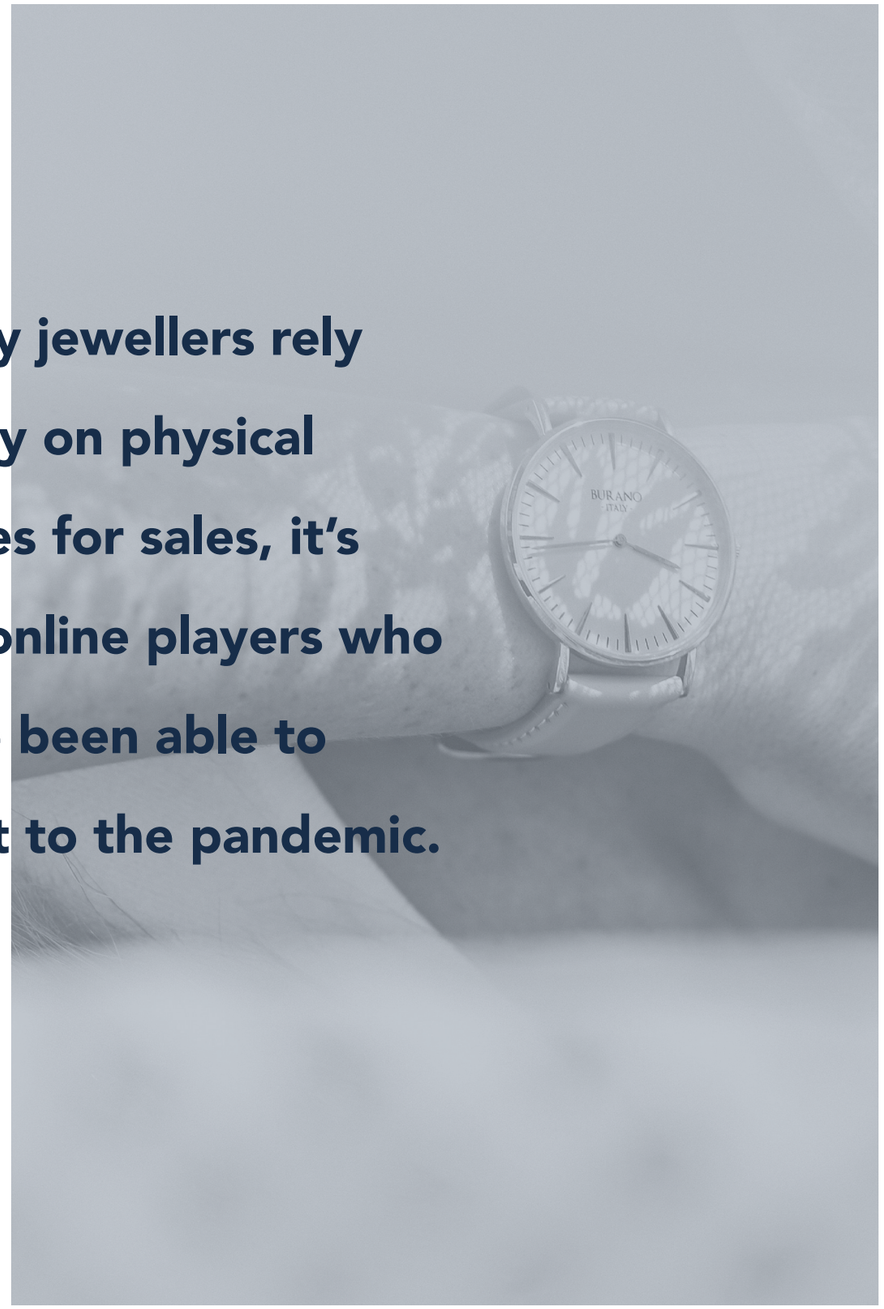


Watches & Jewellery Industry

2021

Annual Insight Report

Salience.
Search Marketing



“

Many jewellers rely solely on physical stores for sales, it’s the online players who have been able to react to the pandemic.

Editor’s Note.



We are Salience. Congratulations on making it to 2021.

We believe in publishing free insights to bring us closer to our favourite brands. If this is the first time you’ve seen our annual market report, we’re a UK search marketing agency who specialise in SEO, Paid Media & Content.

This report highlights your brand’s successes & shortcomings compared to your industry’s biggest names across ten key digital metrics, from your market share of organic visibility to social prowess and consumer search trends.

The data covers 12 of the most turbulent months we’ll, hopefully, ever see. Look to those who performed well not just for search prowess, but also their agility and tenacity as brands.

The office is empty and we’ve all now allergic to Zoom quizzes, but that doesn’t mean we’re not working hard to provide you as much relevant market data as we can. If you have questions about the data or how it can help enable your digital growth, get in touch with the team.

We hope you find value in these insights and have a prosperous new year.

RICHARD WATERS
SALES & MARKETING DIRECTOR
01244 564 501
richard@salience.co.uk

About Salience.

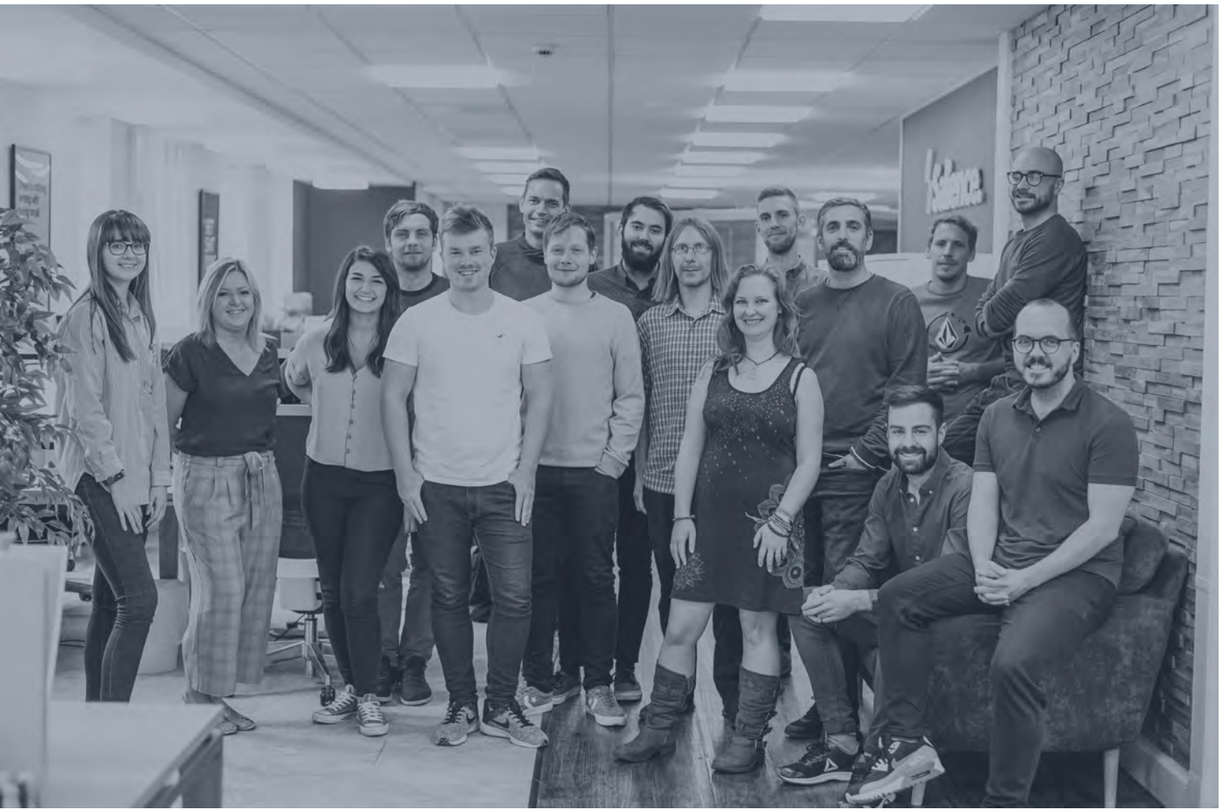
We are search marketers with an edge. From data-fuelled content marketers to business and data analysts, UX designers to and technical gurus, we have the skills and know-how to grow your brand in whichever direction it needs. From new site builds to market leading search campaigns, we're the go-to agency for household names, challenger brands and ambitious start-ups.

Starting in Chester as an SEO & PPC agency, we've expanded our skills and team exponentially over the last 9 years to ensure our clients' digital activities are in peak condition, from analytics to content marketing, we have the skills in-house to give your brand the competitive edge required to compete in todays digital world.

Salience.

Our Services.

- Technical SEO
- Content Marketing
- User Experience
- Paid Media
- Copywriting
- Analytics
- Design
- CRO



> **You can assess the overall success of a site based off of 10 key metrics...**

Contents.

01 Visibility Year on Year

09 Visibility vs Authority

17 Page Speed

21 Search Volume Trends

23 Keyword Trends

27 High Competition Keywords

29 Opportunity Keywords

33 Trust

37 Online Reviews

41 Digital Brand Reach

Visibility Year on Year.



The key SEO metric. Visibility is all about how easily your brand can be found online.

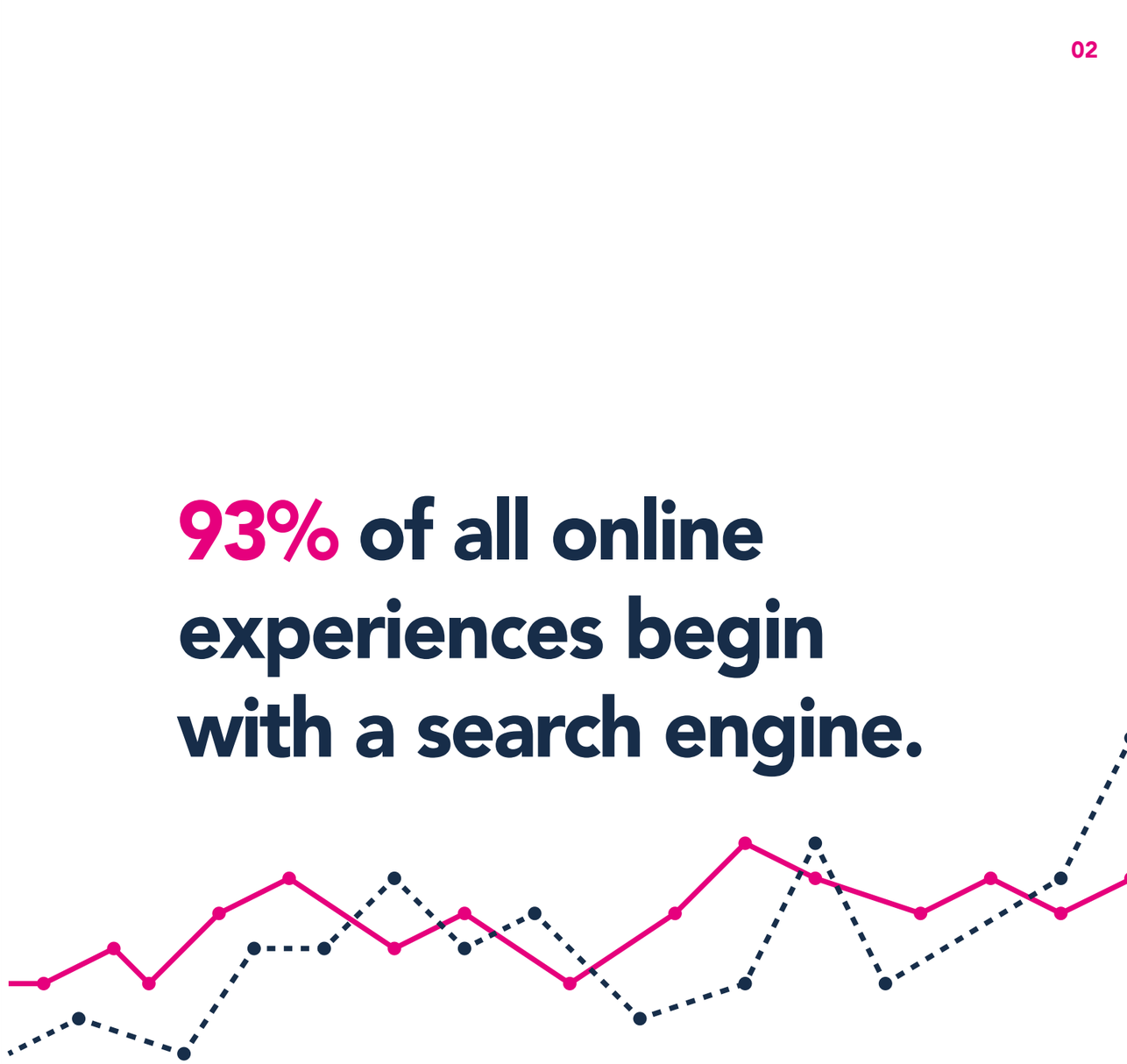
It's a little like the footfall of the internet. The greater your brand's, visibility the more likely you can be found by your target market.

Year-on-year visibility identifies which brands are growing and those who are on a downward trajectory.

Brands with high visibility dominate search engines. They're first to be seen and first to be clicked.

At it's most basic level, the higher your visibility, the more people you can get through the front door.

93% of all online experiences begin with a search engine.



Visibility Findings.



Top 5 Wins

01 ERNEST JONES

02 TIFFANY & CO.

03 Warren James

04 H.SAMUEL THE JEWELLER

05 DIAMONDS FACTORY

These brands are the ones to watch. They're on the rise with the biggest growth in the market. Whatever they're doing, search engines are loving it and you'll want to work out what that is and emulate their strategies, fast.

Bottom 5 Losses

On the opposite end of the spectrum, these brands have had the biggest visibility drops. They're likely to have been punished by a search algorithm update or have let things slide over the course of the year. Either way, learn from their mistakes.

01 ACCESSORIZE LONDON

02 WATCHSHOP

03 claire's

04 F.HINDS JEWELLERS SINCE 1856

05 MYTHERESA



Visibility Scores.

Site	Overall Rank	YoY Change	Visibility 2020	Visibility 2019	YoY Change	Compared to Market
hsamuel.co.uk	1	-	49192	43822	+12%	+7%
ernestjones.co.uk	2	+1	36642	30488	+20%	+14%
beaverbrooks.co.uk	3	-1	30984	32198	-4%	-10%
goldsmiths.co.uk	4	+1	28562	27295	+5%	-1%
pandora.net	5	+1	28368	26384	+8%	+2%
watchshop.com	6	-2	25240	28159	-10%	-16%
tiffany.co.uk	7	+1	22095	16184	+37%	+31%
accessorize.com	8	-1	15443	23074	-33%	-39%
thejewelhut.co.uk	9	-	12042	13142	-8%	-14%
warrenjames.co.uk	10	+10	11486	5782	+99%	+93%
fhinds.co.uk	11	-1	10593	13138	-19%	-25%
watches-of-switzerland.co.uk	12	+2	10456	7979	+31%	+25%
watchfinder.co.uk	13	-1	10231	10227	0%	-6%
claires.com	14	-3	9934	12699	-22%	-28%
swarovski.com	15	-2	8046	8035	0%	-6%
thewatchhut.co.uk	16	-	7814	6756	+16%	+10%
argento.com	17	-2	6982	7367	-5%	-11%
thomassabo.com	18	-	6225	6394	-3%	-8%
fraserhart.co.uk	19	-	5605	6172	-9%	-15%
tjc.co.uk	20	+1	4898	4003	+22%	+17%
mytheresa.com	21	-4	4860	6604	-26%	-32%
diamondsfactory.co.uk	22	+20	4452	1712	+160%	+154%
fossil.com	23	+8	4172	2237	+86%	+81%
jurawatches.co.uk	24	-1	3667	2871	+28%	+22%
gemporia.com	25	-1	3620	2864	+26%	+21%
firstclasswatches.co.uk	26	+6	3568	2143	+66%	+61%
smoochrings.co.uk	27	+3	3385	2320	+46%	+40%
thbaker.co.uk	28	-2	3370	2750	+23%	+17%
watches2u.com	29	-2	2941	2623	+12%	+6%
chisholmhunter.co.uk	30	+5	2861	2086	+37%	+31%

6% Industry Variance

Industry variance is the average of how much visibility change there has been in the market.

So here, this indicates a 6% increase for searches within this industry. If the market's growing, you should be too. If it's shrinking, you need a precise and targetted search strategy.



MARCUS OVEREND
SEARCH EXPERT
01244 564 501
marcus@salience.co.uk

Book a Chat

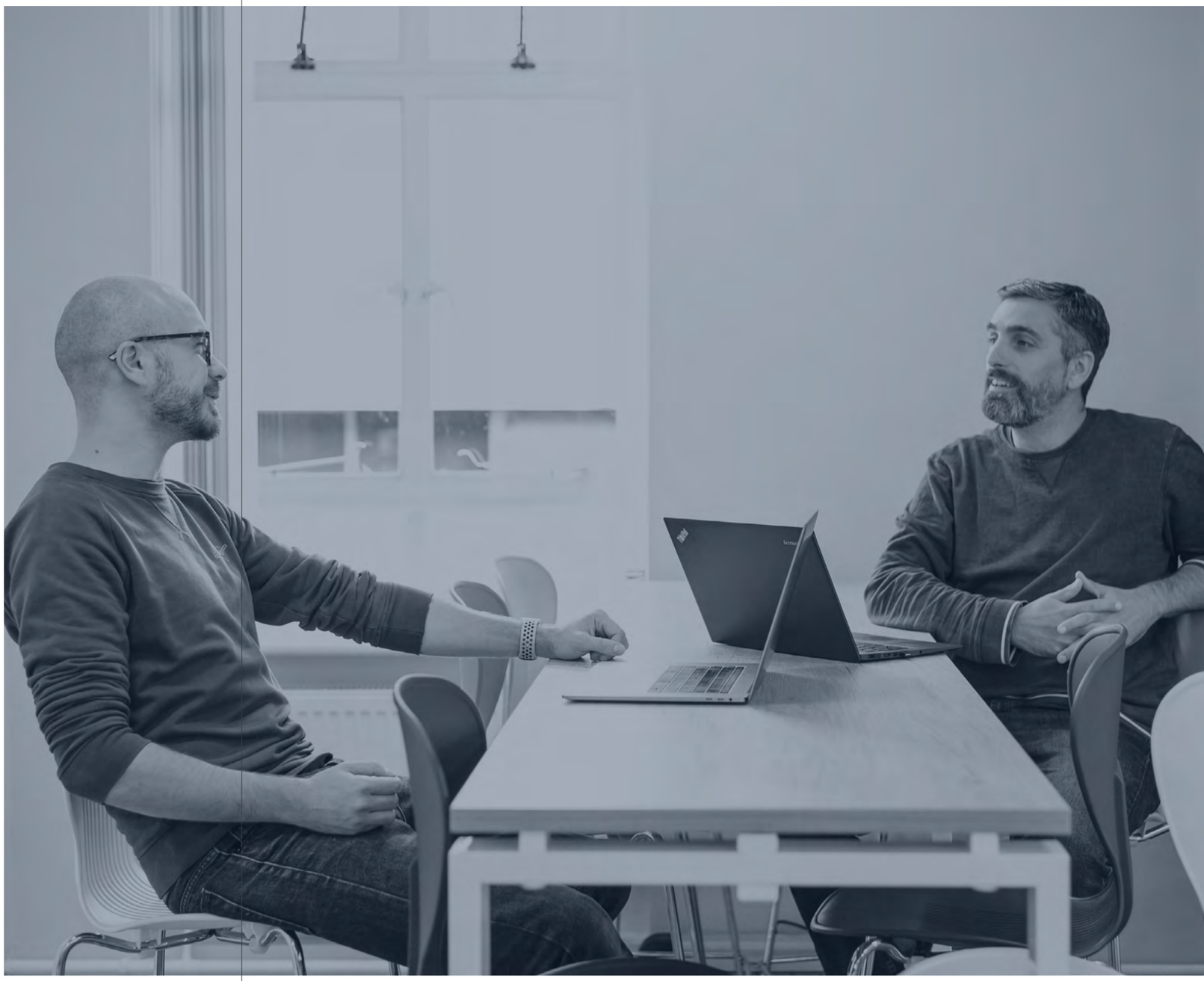
Got a Question?

Want to know more about expanding your brand's digital reach? Get in touch for a no-strings chat and we'll run through the quick win opportunities and wider strategies which will help your brand grow.

Email us.

Live chat.

Arrange a call.



Visibility vs Authority.

Authority is about the stature and reputation of your website. Search engines like high authority sites as they're loaded with trust-worthy signals and likely to provide useful services and content. Authority is measured through a metric called domain rating. The higher it is, the more chance you have to rank for competitive keywords and boost your visibility.

Search engines judge authority through a domain's popularity, size, and age. They use on and off-site signals to determine your rank.

Authority is best achieved through link-building. But it's not about quantity. A few high quality links go miles further than loads of spam.

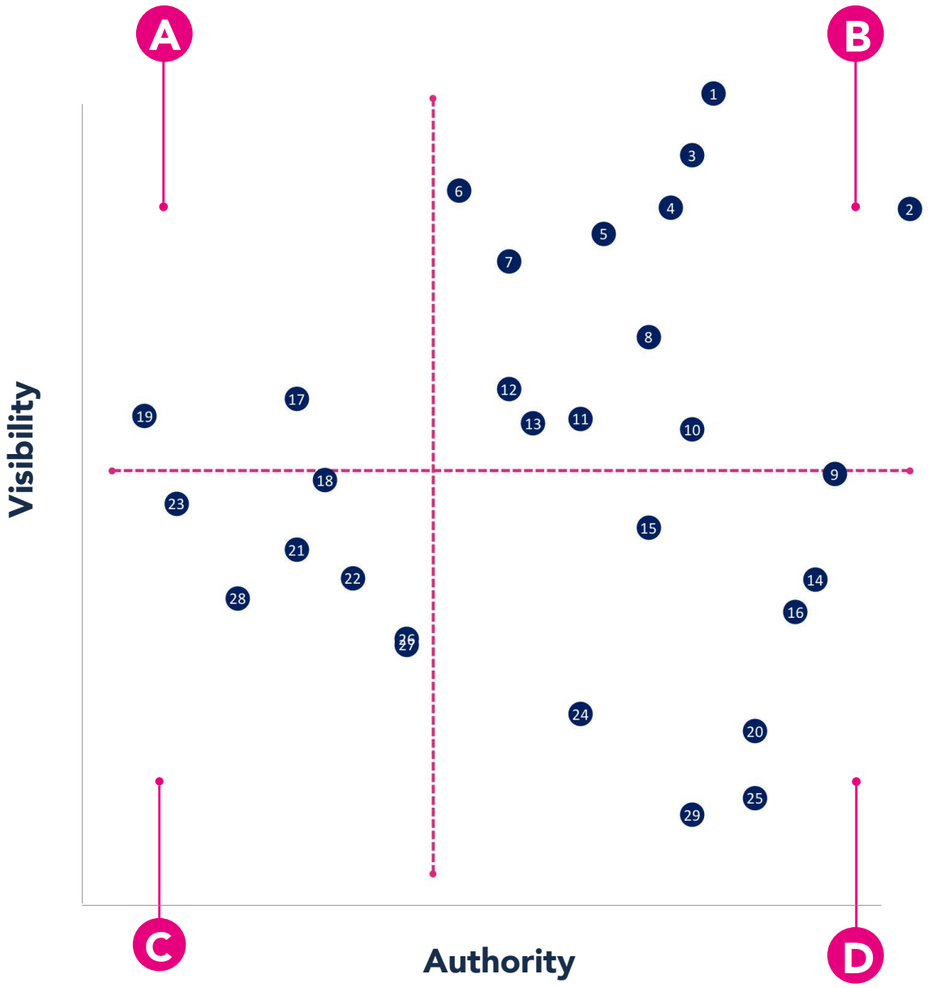
By matching visibility scores to authority, we identify which sites are performing beyond their means. These are the ones to learn from.

Low authority brands who are ranking for high volume terms are the ones to watch. Target the keywords they perform well on for quick growth.



“Analysing visibility vs authority is a great way to find sleeping giants in the industry.

Visibility vs Authority Scores.



Key:

hsamuel.co.uk	1	watches-of-switzerland.co.uk	11	fraserhart.co.uk	21
pandora.net	2	thejewelhut.co.uk	12	tjc.co.uk	22
ernestjones.co.uk	3	watchfinder.co.uk	13	argento.com	23
goldsmiths.co.uk	4	mytheresa.com	14	mappinandwebb.com	24
watchshop.com	5	thomassabo.com	15	bluenile.com	25
beaverbrooks.co.uk	6	fossil.com	16	jurawatches.co.uk	26
tiffany.co.uk	7	warrenjames.co.uk	17	firstclasswatches.co.uk	27
accessorize.com	8	thewatchhut.co.uk	18	diamondsfactory.co.uk	28
swarovski.com	9	fhinds.co.uk	19	tissotwatches.com	29
claires.com	10	tagheuer.com	20	lkbennett.com	30

A Those with high visibility but low authority have laid good foundations for their site and would benefit from increased search marketing activity to build on those foundations.

B Hats off to these guys. They've built their house right and have the search marketing strategy to expand. At this point, you should be thinking about solidifying yourself as market leader.

C Sites with low visibility and authority. Look on the bright side, there's a lot of room for improvement. Brands in this zone should consider urgently rethinking their on-site technical and structural setup, also their keyword strategy and off-site campaigns.

D Low visibility, high authority. At school, these sites were the kids who 'had potential.' There are clearly some on-site issues holding these brands back. Whether those issues lie in content, structure, or tech, an on-site review is highly recommended.

Visibility vs Authority Findings.

Low authority, High visibility

01 BEAVERBROOKS

02 TIFFANY & CO.

03 thejewelhut

04 Warren James

05 F.HINDS JEWELLERS SINCE 1856

These brands could benefit most from a more expansive search marketing campaign. Things are looking good technically, and a strategic content marketing campaign is likely to yield positive results.

High authority, Low visibility

01 SWAROVSKI

02 MYTHERESA

03 FOSSIL

04 TAG HEUER

05 BLUE NILE

These brands could benefit most from resolving their on-site tech and structural issues. Identification of those problems, and dealing with them in a priority order should be their key objective.

Our Experience.

Since 2009, we've provided search marketing services for household names, challenger brands and ambitious start-ups across retail, lead generation, finance & charity. We work on Agile principles, born from the belief that marketing challenges rarely come with six month's notice, so there's no point in making planners that far in advance. We assess the biggest issues and opportunities for our clients at the start of every sprint. We are a new breed of search marketing agency that moves fast and adapts to opportunities in the moment, not in a month.

10+
years experience

£85M
organic transactions

58M
organic sessions

Find Out More

> **The results we've achieved from Salience's content marketing efforts have exceeded my expectations.**
>
> **- Paul Hambridge, MD**

FACTORY DIRECT FLOORING

Read the Case Study



Page Speed.

Perhaps 2021's biggest news in the world of digital marketing, Google have announced a new ranking factor set to shake up the web.

Titled Core Web Vitals, this new ranking factor will centre around page speed. We're talking largest contentful paint (LCP) and first input delay (FID) - in simple terms, how fast your site loads and how fast it can be interacted with.

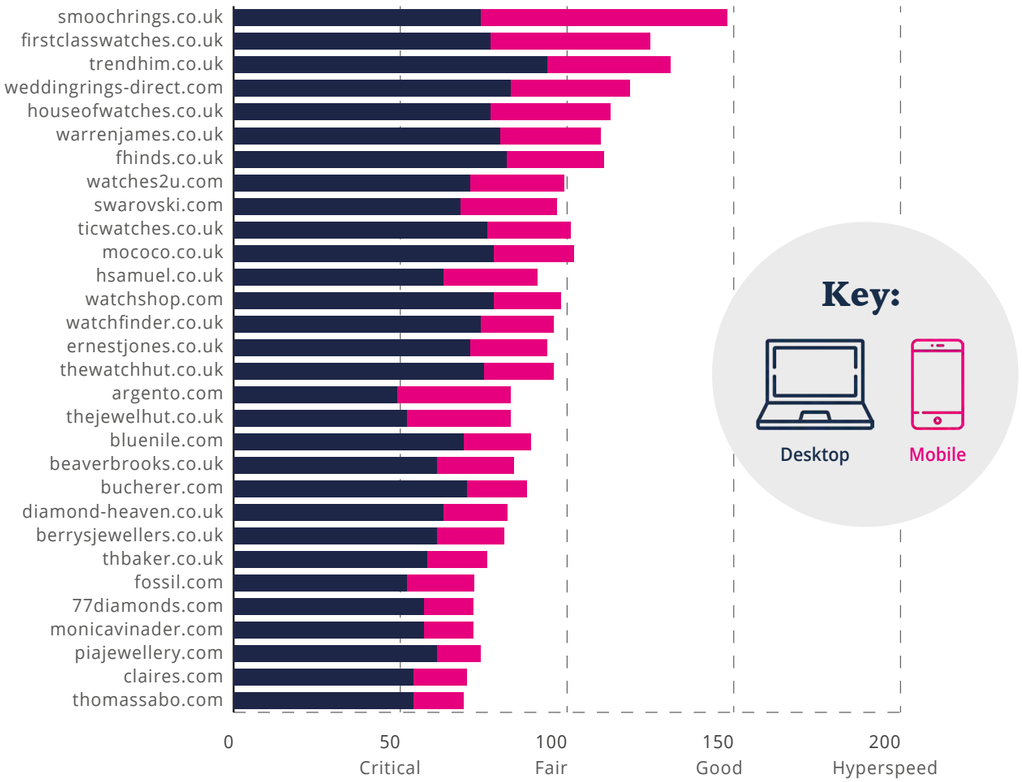
The first step is to check how you compare against the rest of your industry.

Luckily, we've got just the thing. Our page speed leaderboard shows which brands are lightning fast and those lagging behind.

> **"A 1 second delay in page load time results in a 7% loss in conversions.**



Page Speed Scores.



“Core web vitals (LCP & CLS) become a ranking factor in May ‘21. Expect this to have a much bigger impact on search performance once live.



MARCUS OVEREND
SEARCH EXPERT
01244 564 501
marcus@salience.co.uk

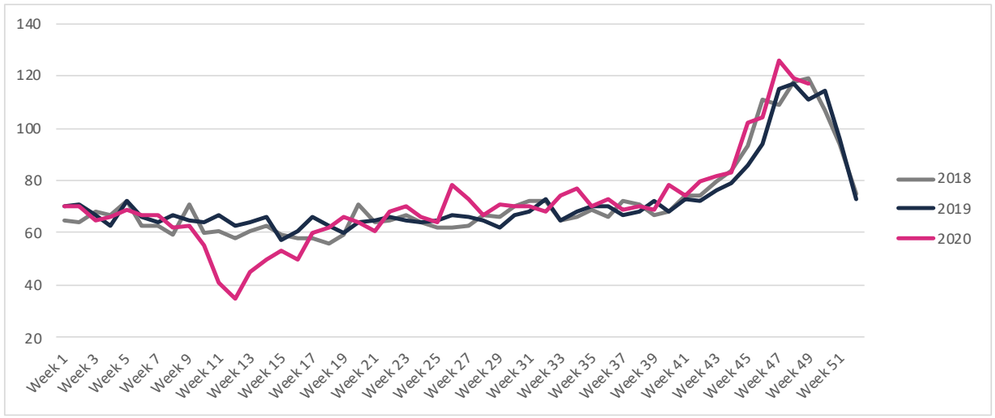
Email us.

Live chat.

Arrange a call.

Search Volume Trends.

In a nutshell, search volume trends show how interest has changed for the products, services, and content provided within your industry. A downward trend means less people are searching. An upward trend means interest is on the rise and new opportunities are up for grabs. Either way, it's important to stay on top of when search is high and low to help inform your strategy for search.



Bar a drop in March, searches for jewellery products have held steady.



RICHARD WATERS
SEARCH EXPERT
01244 564 501
richard@salience.co.uk

Book a Chat

Keyword Trends.

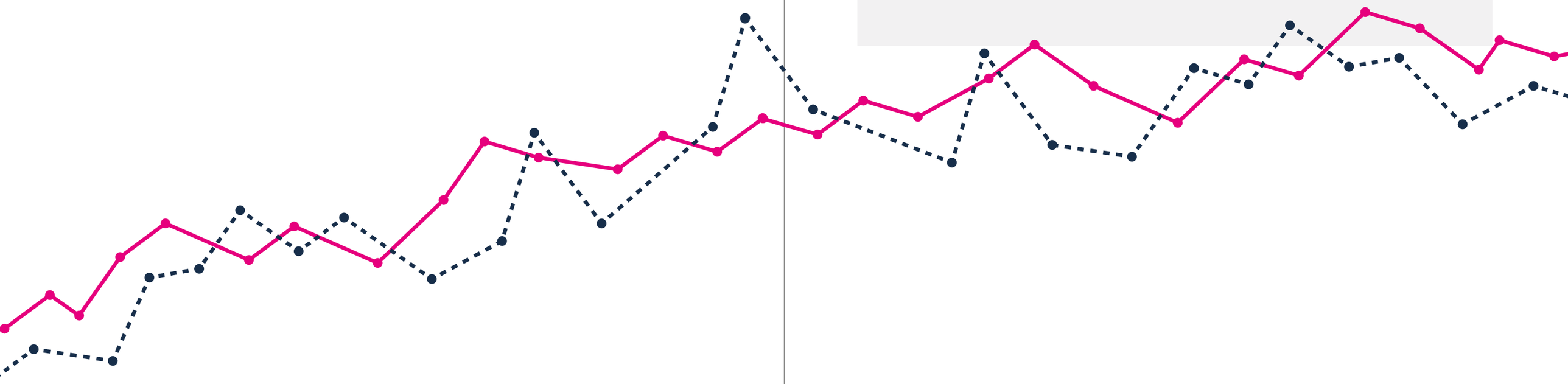
We've been keeping a close eye on what keywords people are searching for in the market, allowing us to see what is trending.

In the following sections we'll give you the heads up on which keywords are on the rise and need your attention, alongside those which are becoming less and less important.

Using historical search data, we're able to find trend patterns and identify opportunities ahead of the curve.

Our search and content strategists continually monitor industry movements. From here, we're able to spot content and category gaps before they're deemed industry-standard.

> **"2020 and COVID brought monstrous changes to the consumer landscape. Monitoring changes in search volume for keyword groups is essential to spotting new trends and surging demand.**



Emerging Trends ↗

Keyword	Search Volume	Interest Trend
jewellery	201,000	+22%
mens jewellery	33,100	+56%
gold earrings studs	14,800	+93%
earrings studs	27,100	+43%
gold jewellery	12,100	+100%
silver earrings studs	12,100	+75%
designer jewellery	9,900	+124%
personalised name necklace	12,100	+83%
silver jewellery	18,100	+56%
personalised jewellery	14,800	+49%

Receding Trends ↙

Query	Search Volume	Interest Trend
armani watches	74,000	-23%
hugo boss watches	60,500	-18%
michael kors watch	74,000	-14%
olivia burton watches	33,100	-29%
pocket watch	27,100	-33%
gucci watch	40,500	-18%
watches	201,000	-3%
sekonda watches	14,800	-29%
ted baker watches	6,600	-53%
tommy hilfiger watches	18,100	-23%

“

Brand related searches seem to be taking a hit in the jewellery market this year. Whereas general searches for types of jewellery are on the rise.



MARCUS OVEREND
SEARCH EXPERT
01244 564 501
marcus@salience.co.uk

Email us.

Live chat.

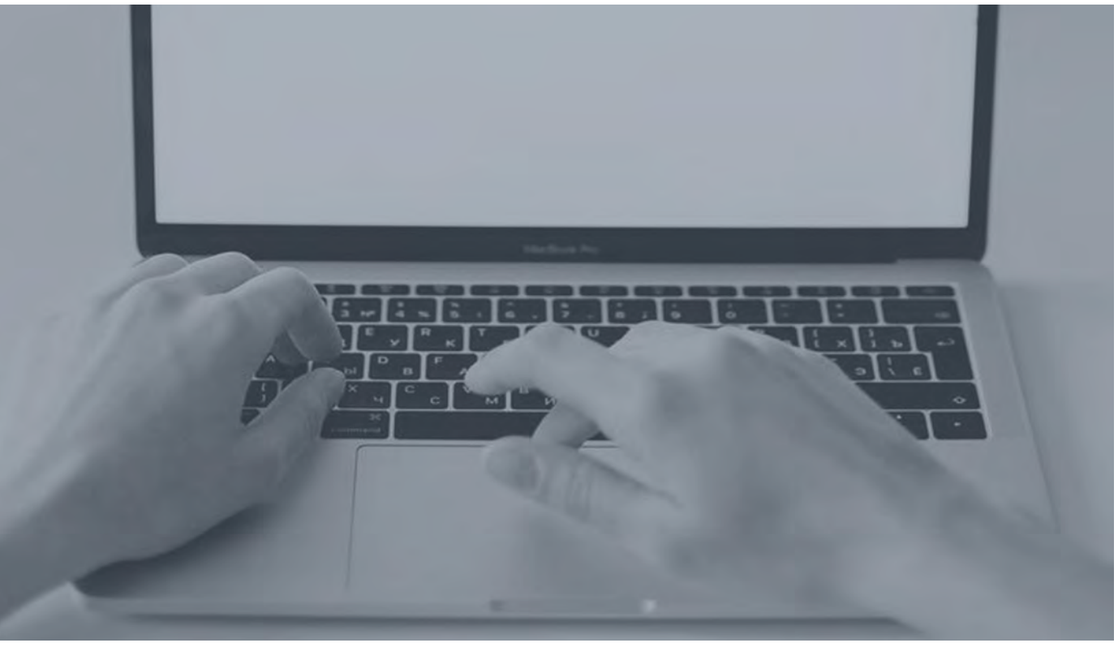
Arrange a call.

High Competition Keywords.

These keywords are the heavyweight belts, the golden tickets, the ones to tell your nan about. For top of market brands holding these positions, close monitoring and continued search marketing activity is needed to safeguard them. For challenger brands looking to weigh in, you best bring your A-game.

High competition keywords are typically sought after by big brands. We're talking those with brick and mortar stores & large brand reach.

Qualifying intent is more important than ever on these keywords. Providing the correct user journey upon first click is critical.



1. Jewellery
   201,000 91.05
2. Mens watches
   165,000 86.51
3. Necklaces
   90,500 87.25
4. Womens watches
   74,000 87.8
5. Mens bracelets
   49,500 88.06
6. Ladies watch
   49,500 86.26
7. Silver chain
   40,500 86.99
8. Gold earrings
   33,100 87.86
9. Gold necklace
   33,100 87.54
10. Mens necklaces
    33,100 86.79

Key:

- Local Monthly Searches (UK)
- Competitiveness Score

Opportunity Keywords.

These terms have less competition yet high search volumes. As such, they are a perfect battle ground for all brands in the industry to increase their digital reach.

Marketing teams across the industry ignore these terms but audiences are interested. With strong volumes and low competition, they're ripe for the taking.

For challenger and low-visibility brands, these are the terms where you'll see most success. Concentrate on these and you'll see traffic and revenue start to grow.

For market leaders, these are the terms that have probably skipped your radar. Dig into these and corner the market.

> **Opportunity keywords are simply one indicator of who has the most potential to increase their organic channel revenue in the foreseeable future.**

1. Engagement rings
   301,000 78.52
2. Wedding rings
   90,500 75.42
3. Name necklace
   40,500 74.9
4. Diamond rings
   49,500 79.5
5. Pearl necklace
   27,100 76.23
6. Nose studs
   22,200 76.99
7. Wholesale jewellery
   3,600 58.29
8. Mens wedding rings
   27,100 79.41
9. Vintage engagement rings
   12,100 73.3
10. Personalised name necklace
    12,100 73.38

Key:

- Local Monthly Searches (UK)
- Competitiveness Score

Our Clients.

Our clients are an eclectic mix from all over the globle. But they all share the same goal, to be more prominent across their market and increase their profitability.

We've provided blended solutions across SEO, paid search, content marketing, user experience, CRO, digital PR and social media. Over the last 10 years, we've worked hard, delivered results and won awards.



638 Clients over the years

Dreams

LAURA ASHLEY

TOTALLY WICKED®

FACTORY DIRECT FLOORING

SCOTCH & SODA AMSTERDAM COUTURE

Find Out More

4 UK Search Award Nominations in 2020

UK BIDDABLE MEDIA AWARDS

UK Agency Awards 2020

Trust.

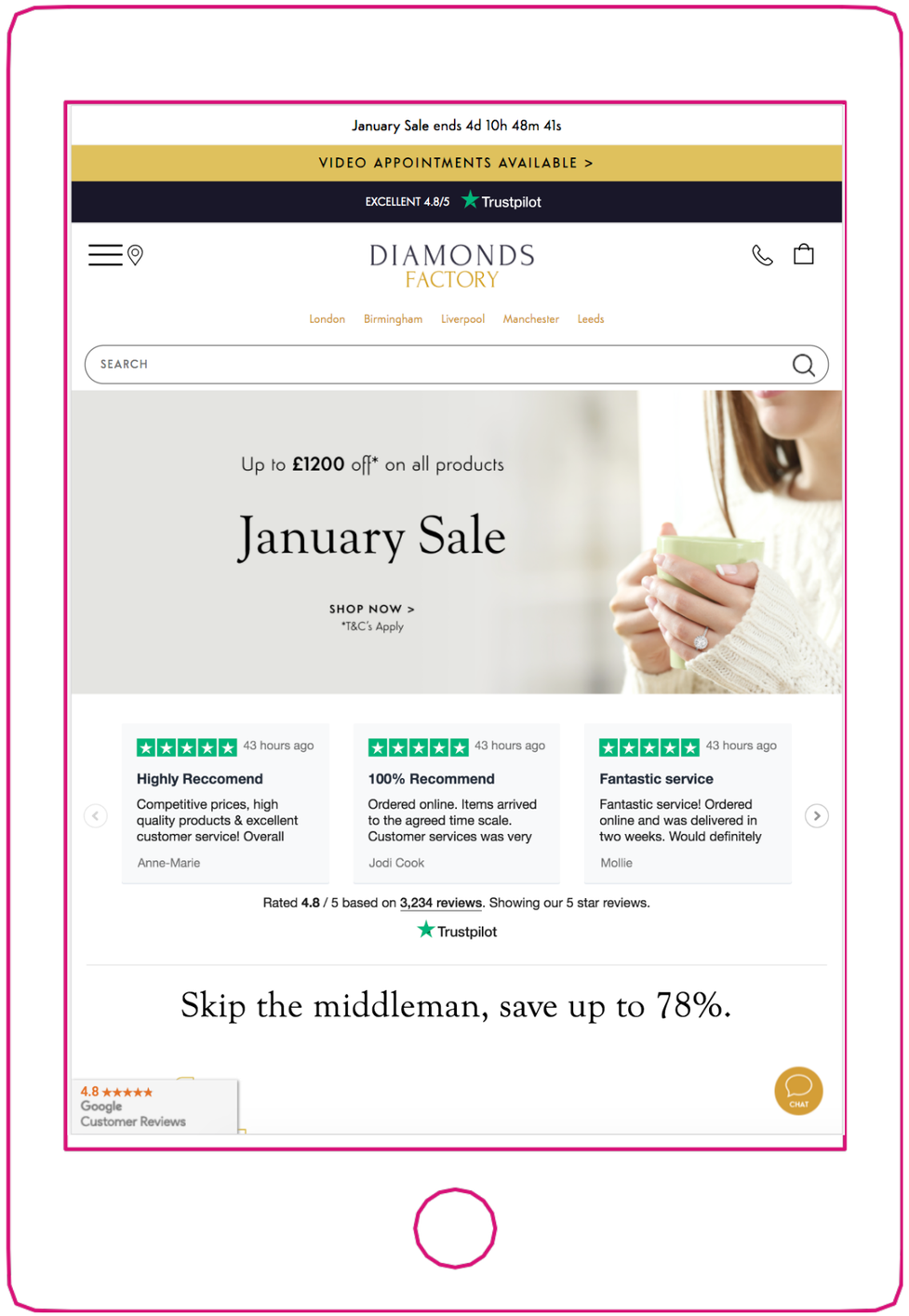
First introduced with the E-A-T Algorithm update in 2018, trust has since become a critical ranking factor. But there's no single score to judge trust. Instead, it's a holistic view of your website's expertise, authority and trustworthiness. It centres around both on and off-site signals. Think external review platforms, high-quality links, transparency over processes and policies, and plenty more.

Your Money Your Life (YMYL) / eCommerce brands are those most likely to see visibility drop as a cause of poor trust signals.

Search quality evaluator guidelines identify how manual reviewers evaluate your sites trust-worthiness. Use these to get ahead.



Trust centres around both on and off-site signals.



Rising Star Jeweller: Diamonds Factory See's Gold Standard Growth.

Diamonds Factory have risen 22 places in our organic visibility league table in 2020, rising from bottom of the pile to being just shy of the top 20 biggest online jewellers. We believe clearly displaying trust signals across the site are an element of their success.

Their home page alone shows great examples of trust signals. As soon as you land on the page, you're smacked in the face with embedded Trust Pilot reviews. It is nothing flashy, however it works for humans and search engines alike in trusting the site.

Other suave signals on the home page include:

- Logos of big publications they've received coverage on
- Money back guarantees in the banner
- Badges to show diamonds have been sources ethically

Top marks for Diamonds Factory!



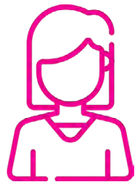
Online Reviews.

First introduced with the E-A-T Algorithm update in 2018, trust has since become a critical ranking factor. But there's no single score to judge trust. Instead, it's a holistic view of your website's expertise, authority and trustworthiness. It centres around both on and off-site signals. Think external review platforms, high-quality links, transparency over processes and policies, and plenty more.

A key element of trust, reviews are essential to your search marketing arsenal. Having more good reviews than your competitors is important for off-site trust signals (part of the EAT update), local pack prominence, and CTR where star-ratings feature in the SERPs.



Incorporate external review platforms into your buying process to ensure maximum take-up.



Bad reviews need to be answered and fast. Users are more likely to ignore bad reviews if they see fast replies.



eCommerce sites are judged by both users and search engines on their review platforms.

90%

of people check online reviews before buying from a business.

94%

of people say they often avoid businesses below a 4 rating.

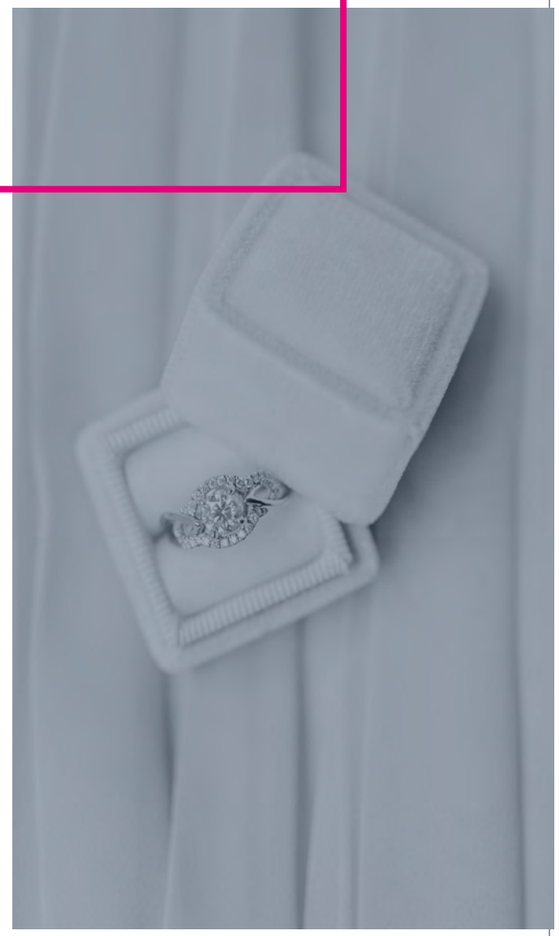
48%

of people only pay attention to reviews written within the past 2 weeks.

45%

of people are more likely to visit a business that responds to their negative reviews.

Average Industry Review Score:



This is the average review score across your industry. Simply, you need to make sure your reviews are singing similar notes.

Take a look at the highest reviewed sites on the next page to find out how you compare. If you're lagging behind, explore how your competitors maximise their amount of reviews or get in touch and we'll audit your site and work out how you can improve.

We've not included the full data set here so if you're intrigued to see how you can compare, get in touch and we'll send across the full package.

Highest Reviewed Sites.

1. watchfinder.co.uk
   4.8 25,485
2. argento.com
   4.7 30,493
3. thejewelhut.co.uk
   4.7 17,541
4. watchshop.com
   4.6 21,243
5. firstclasswatches.co.uk
   4.9 9,821
6. mytheresa.com
   4.7 7,346
7. gemporia.com
   4.6 7,289
8. warrenjames.co.uk
   4.5 6,285
9. jurawatches.co.uk
   4.5 5,333
10. diamondsfactory.co.uk
    4.7 3,195

Key:

- Review Score
- Number of Reviews

Digital Brand Reach.

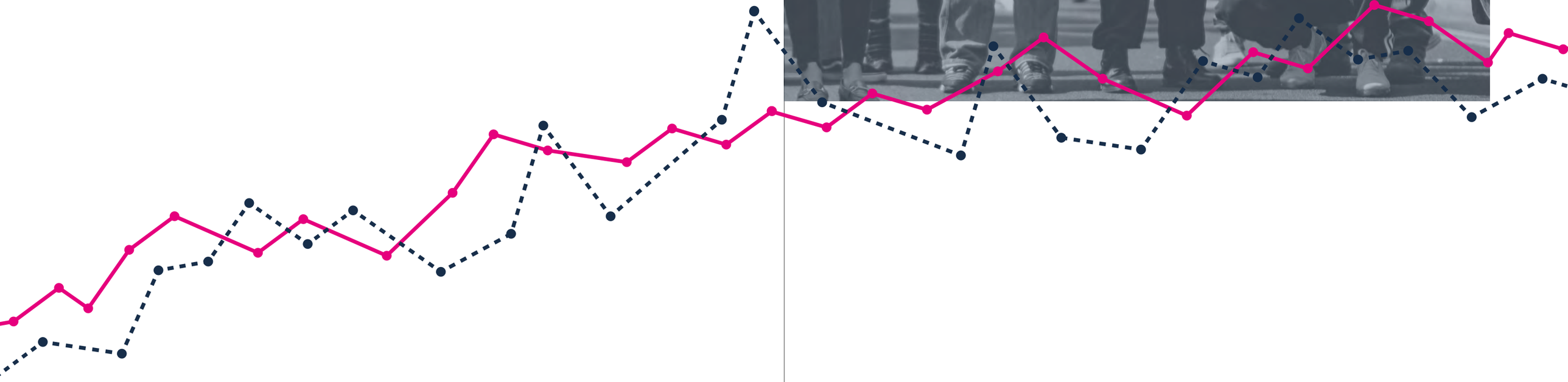
Digital Brand Reach centres around how well recognised your brand is within the industry. To calculate this figure, we blend traditional search metrics with performance of social channels across the sector. This helps identify which brands are most prominent across a range of channels and those who are lost to the abyss.

Brand searches are a traditional measure. Owned social is really important too. This identifies audience you have access too.

Brand searches are a traditional measure of how many people are searching for your brand name through search engines.

Owned social scores are increasingly important in this hyper-digital world. Improving yours is key to cross-channel traffic acquisition.





Brand Reach Findings.

Top 5 Brand Searches

1. PANDORA
1,830,000

2. H.SAMUEL THE JEWELLER
450,000

3. SWAROVSKI
301,000

4. ACCESSORIZE LONDON
301,000

5. Warren James
301,000

Monthly Searches (UK)

Monthly brand searches shows an indication of brand recall within search behaviour. The top five are the most recalled names within search.

Top 5 Social Scores

1. PANDORA
42,088

2. TIFFANY & CO.
34,246

3. SWAROVSKI
25,117

4. FOSSIL
10,170

5. TAG HEUER
9,800

Owned Social Score

Social score considers followers and engaged conversations on all major social platforms. The top five have a strong following, creating engagement through content and product campaigns.

Brand Reach Scores.

Site	Brand Searches Per Month	Owned Social Score	Rank
pandora.net	1830000	42088	1
swarovski.com	301000	25117	2
tiffany.co.uk	165000	34246	3
tagheuer.com	110000	9800	4
accessorize.com	301000	3068	5
fossil.com	74000	10170	6
claires.com	165000	4297	7
warrenjames.co.uk	301000	1297	8
thomassabo.com	110000	2816	9
hsamuel.co.uk	450000	336	10
tissotwatches.com	22200	5267	11
monicavinader.com	90500	1232	12
goldsmiths.co.uk	165000	460	13
watchshop.com	110000	536	14
bluenile.com	12100	4050	15
ernestjones.co.uk	201000	223	16
beaverbrooks.co.uk	165000	211	17
lkbennett.com	49500	620	18
mytheresa.com	9900	2329	19
watchfinder.co.uk	135000	131	20
watches-of-switzerland.co.uk	40500	402	21
gemporia.com	110000	128	22
argento.com	33100	152	23
mappinandwebb.com	14800	255	24
77diamonds.com	14800	203	25
thejewelhut.co.uk	9900	257	26
johngreed.com	14800	154	27
daisyjewellery.com	9900	170	28
fraserhart.co.uk	22200	59	29
tjc.co.uk	8100	148	30

Pandora, the world's third largest jewellery company, saw a painful year in brick and mortar, with 80% of their 2,700 stores temporarily closing because of the pandemic.

Online has been the saviour during this time, with the BBC reporting **89% online growth** in the 3 months to the end of September. As of November sales are only down only 2% Year on Year.

No doubt having the greatest digital brand reach in the market has been a big supplement in keeping profits afloat.



RICHARD WATERS
SEARCH EXPERT
01244 564 501
richard@salience.co.uk

Book a Chat

Get in Touch.

This report shows industry data at a top level; We simply don't have space to add all the resulting insight as well. Give us 30 minutes of your time and we'll be able to give you actionable steps to improve your position in the rankings, or further dig down into your competitor's movements.

Email us.

Live chat.

Arrange a call.

